

# OEP Cheatsheet



## When is Open Enrollment Period?

January 1 to March 31

## Who is eligible to make changes during OEP?

ONLY Medicare Advantage (MA) or a Medicare Advantage Prescription Drug Plan (MA-PD) plan members effective January 1.

## Are new beneficiaries eligible to make changes during OEP?

New to Medicare beneficiaries who choose to enroll in a MA/MAPD plan can use the OEP, but ONLY during the first three months in which they have both Part A & B

## What about Part D plan members?

Part D plan members are not eligible to use the OEP to switch plans.

## What can eligible plan members do during OEP?

- 1) Change from an MA or an MAPD to a different MA or MAPD plan
- 2) Drop MA or MAPD coverage and return to Original Medicare (with or without Part D)

## Plan and Agent Dos

- Conduct marketing activities that focus on other enrollment opportunities, including but not limited to Marketing
  - To those Turning 65 and yet to make an election.
  - Available 5-star plans
  - Dual-eligible and LIS beneficiaries who, in general, may only make changes once per calendar quarter during the first nine months of the year
- Reach out to all existing clients to ensure they are informed and confident with their AEP plan selection

## Plan and Agent Don'ts

- Send unsolicited materials advertising the ability/opportunity to make an additional enrollment change or referencing the OEP
- Specifically target beneficiaries who are in the OEP because they made a choice during Annual Enrollment Period (AEP) by purchase of mailing lists or other means of identification
- Engage in or promote agent/broker activities that intend to target the OEP as an opportunity to make further sales; or
- Call or otherwise contact former enrollees who have selected a new plan during the AEP.